



## **APPROVING EVA REQUISITIONS**

## Approving an eVA Requisition

Most eVA requests require approvals. Approvals are automatically assigned based on the:

- User's profile,
- Agency's business rules, and
- Dollar amount of the requisition/eForm.

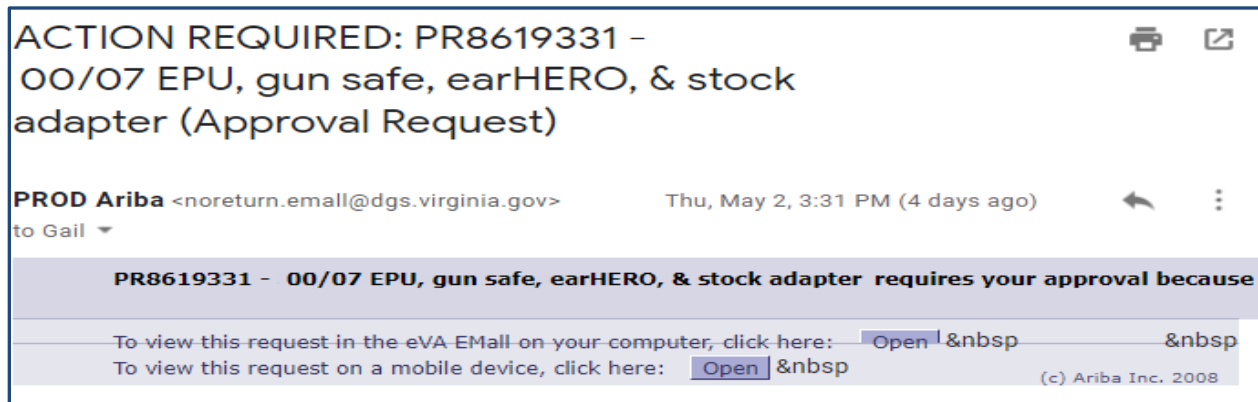
Approvals are usually handled by users who have been assigned an approval role. Any user who is a member of that group can approve the transaction. Depending on your agency/entity setup, you might encounter requisitions/eForms that display a specific individual name and not a role.

*NOTE: Clicking the role name on the Approval Flow tab will allow you to view the names of the assigned individuals.*

A final 'print' approval displays at the end of the workflow on requisitions when the supplier cannot receive orders electronically. The purpose of this approval is to remind the requisition requester that the order must be printed and faxed/mailed to the supplier. *Caution: If an approver with the 'No Refire workflow' role chooses a print vendor over the original electronic vendor, and does not refire the workflow, the final print approver will not display.*

Approvers are notified by email when a transaction is awaiting their approval.

### Example of Notification Email



### Accessing Items awaiting your Approval

Once logged into eVA, you will see a link on the Portal called 'Pending My Approval', as shown on next screen.

When clicking 'Pending My Approval', you can locate and access a particular transaction immediately. *NOTE: Items awaiting approval inside an agency 'Queue' do not appear on this screen. (Queue Management setup)*

ID	Description	Status	Create Date
EVA001_QQ014551	Office furniture	Closed	04/11/2019
EVA001_QQ014547-V2	Footballs - cpls-9522	Closed	04/11/2019
PR633122	Color Toner Cartridges	Composing	04/03/2019

When above link is selected, transactions awaiting approval appear.

ID	Description	Total Amount	Create Date
PR633314	Office furniture	\$150.00	04/26/2019
PR633203	Gosal - Communication - Radios	\$1,000,000.00	04/16/2019
QQ:QQ014541-V2_AWD1481	Croxton's Flowers Bid - VUU	\$20,575.00	04/04/2019
PR633113	(White) SAFETY - INSPECTION STICKER PURCHASE	\$600.00	04/03/2019
FORM14393	P005TF - DGS_IPA_	\$0.00	04/03/2019

## Approvals Accessed via My Home or My Approvals Tabs

You can access the approvable directly from the 'To Do' window, or from the 'My Approvals' tab, as shown below.

ID	Date	From	Status	Title	Required Action
PR633315	4/26/2019	Bryan, Hamilton	Ordered	test	<a href="#">Watch</a>
PR633314	4/26/2019	Bryan, Hamilton	Submitted	TEST	<a href="#">Approve</a>
DPS-EX1171	4/25/2019	Kirby1, Lisa	Submitted	P194DPSMINIMUM - Quick Quote	<a href="#">Approve</a>
PR633224	4/17/2019	Stanley, Sandra	Ordered	Mass Edit on Receipts	<a href="#">Watch</a>

ID	Date	From	Status	Title	Required Action
PR486340	7/2/2013	user2, mobile	Submitted	CSPL 5342 Test 2	<a href="#">Approve</a>
PR486133	5/14/2013	user, mobile	Submitted	PDF test eVA Mobile	<a href="#">Approve</a>
PR486072	5/6/2013	user, mobile	Submitted	Mobile 50 Items test 2	<a href="#">Approve</a>
PR486070	5/6/2013	user, mobile	Submitted	mobile 40 line items	<a href="#">Approve</a>
PR486069	5/6/2013	user, mobile	Submitted	30 line item mobile test	<a href="#">Approve</a>

When the 'Approve' link is chosen, or if you click an ID from the 'Pending My

Approval' on the Portal screen, the **APPROVAL SUMMARY** screen appears. This view contains most information you need to make an approval decision for that requisition, including a detailed list of line items ordered, the approval flow for the requisition, and any comments the preparer has added.

## Approval Summary Screen

The screenshot displays the eVA system interface for the 'Approval Summary - Government Center - Printer Maintenance' screen. The top navigation bar includes links for Home, Help, and Logout, along with a 'Welcome admin, a' message. The main header shows the request number 'PR487780' and a dropdown for 'of 306'. Below the header, there are buttons for 'Approve', 'Deny', 'Edit', and 'Print', which are circled in red. A callout points to these buttons, stating 'Approval Command Buttons'. Another callout points to the 'Request' dropdown, stating 'Move through Approvals by Requisition Number'. The main content area shows the request details, including the supplier 'XEROX', location 'DETROIT', and contract number '43212105'. It also displays the 'Line Items' table with 5 items, including '006R01298 Toner, 12000 Page-Yield, 2/Pack, Black'. The 'APPROVAL FLOW' section shows a flow from 'PR487780' to 'admin, a' and then to 'Pond, Emily', with a legend indicating 'Active' and 'Pending' status. The 'COMMENTS' and 'ATTACHMENTS' sections are also visible at the bottom.

Jump to Navigation Jump to Content

eVA

My Home My Orders/My UPS My Approvals My Quick Quote Req's

Create Search Manage Recent Preferences

Home | Help | Logout

Welcome admin, a

Customize

Request PR487780 of 306

Approval Summary - Government Center - Printer Maintenance

Review the request and then approve, deny, or edit it. To view request details, click the request ID. To view all requests, select a specific request from the pull-down list, or click an arrow to display the previous or next request.

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Approve Deny Edit Print

PR487780 - On Behalf Of : Pond, Emily Total : \$10,420.00000 USD

Line Items (5)

Hide Details

No.	Type	Description	Qty	Unit	Cost Center	Price	Amount
1		006R01298 Toner, 12000 Page-Yield, 2/Pack, Black	15	each		\$263.00000 USD	\$3,945.00000 USD

Supplier: XEROX  
Location: DETROIT  
UNSPSC Code: 43212105  
Contract Number:  
Bill To: Main Billing Address  
Small Business: ☐  
Minority Owned Business: ☒  
Woman Owned Business: ☒  
Micro Business: ☐  
Reg. Type: Self-Registered  
Accounting:

Cost Allocation: 100%

Fund: 000001  
Organization: 000011  
Account: 00012  
Program: 00013  
Activity: 000014

APPROVAL FLOW

Legend: ☒ Active ☐ Pending

PR487780 ☒ admin, a ☐ Pond, Emily ☐ Approved

Add Approver Delete Approver

COMMENTS

Add Comment

ATTACHMENTS

Add Attachment

Request PR487780 of 306

## Approving Requisitions (New and Changed)

Before you approve a requisition, review it carefully. Small details can become big problems when mistakes go unnoticed.

Although the **APPROVAL SUMMARY** screen displays most details, it does not show everything. If you want to review all transaction details (e.g. Shipping details, line attachments, etc.), click the Requisition Number link that appears above the first line item.

## Requisition Number Links to Summary Tab for Complete Details

**Approval Summary - Govt Ctr - Printers and Supplies**

Review the request and then approve, deny, or edit it. To view request details, click the request ID. To

[Back](#)

PR485369 - On Behalf Of : [Pond, Emily](#) Total : \$5,600.03000 USD

[View details of this Requisition](#)

**Line Items** (5)

No.	Type	Description
1		Ink jet color printer

List of key details to review:

### Approval Review Guide

Detail to Review	Impact on Approval
Account Codes	Account Code fields might have been auto-populated with default values from the user's BSO profile. <ul style="list-style-type: none"><li>• All requisitions should be evaluated to ensure they carry the correct Account codes.</li></ul>
Supplier	<ul style="list-style-type: none"><li>• Is the vendor correct? No requisition should be processed with a 'Vendor to be Determined' appearing in the Supplier field.</li></ul>
Dollar values at line level and Total Cost	<ul style="list-style-type: none"><li>• Evaluate the total dollar amount of the requisition. Negative line item amounts are permitted by the system but may not be permitted by the agency.</li></ul>
Bill To & Ship To	<ul style="list-style-type: none"><li>• Verify that the addresses are correct for each line item.</li></ul>
Comments	Comments might provide specific details about what is being purchased and why. <ul style="list-style-type: none"><li>• Verify the details and whether the comments will be included on the purchase order.</li><li>• If they are to be included on the purchase order, the <b>Visible to Supplier</b> checkbox must be selected.</li><li>• Also review comments inserted by prior approvers.</li></ul> <b>CAUTION!</b> Approvers cannot their own comments/attachments nor can they remove the end user's. If necessary, deny the transaction and request the end user to resubmit after they delete the offending item.
Attachments	Attachments also might provide specific details about what is being purchased and why. <ul style="list-style-type: none"><li>• Verify the details and whether the attachment(s) will be included on the purchase order.</li><li>• If they are to be included on the purchase order, the <b>Visible to Supplier</b> checkbox must be selected.</li></ul>
Approval Flow	<ul style="list-style-type: none"><li>• Verify the approval flow includes all required parties.</li><li>• Additional approvers may be added, if necessary.</li></ul>
Shipping Details	<ul style="list-style-type: none"><li>• If the 'See Line Item Shipping Details' checkbox on the Summary screen is checked, verify details at the line level.</li></ul>

When you have completed your review, click **Approve** or **Deny**. The requisition will disappear from your **To Do** list. The preparer will be able to see your approval on the **Approval Flow** tab of the **REQUISITION DETAILS** screen.

## Approval Flow Tab Tracks Requisition Approval Status

The screenshot shows the 'Approval Flow' tab for requisition PR485369. The flow starts with a green checkmark icon, followed by a green box labeled 'Pond, Emily', then a blue box with a white exclamation mark labeled 'O'Admin2, a', and finally a green box labeled 'Approved'. Below the flow, there are buttons for 'Add Approver' and 'Delete Approver'.

## Editing a Submitted Requisition

Approvers with Edit permission can change a requisition/eForm and re-submit the revised version. An **Edit** button is visible next to the **Approve** and **Deny** buttons.

Clicking the **Edit** button opens the transaction in edit mode so changes can be made. When finished, clicking the **Save** button saves the changes. The approver must still click the Approve button when finished.

**NOTE:** Editing the requisition causes the approval flow to reset according to the new values on the requisition UNLESS the approver has the 'eVA-NoRefireWorkflow\_None' role and chooses not to check the "Re-fire approval..." checkbox that appears on the below Summary screen.

The screenshot shows the 'Summary' screen for a requisition. It includes fields for 'Entity Header Cross Reference', 'Confirming Order; Do Not Duplicate', and 'Accounting Summary'. A checkbox labeled 'Re-fire approval workflow after edit:' is highlighted with a yellow background and a blue arrow pointing to it.

If the approver has the eVA-NoReapprovalwithApproverEdit' role, the workflow will re-fire regardless if a change is made to quantity or price.

## Delegating Approval Authority

If you are unable to access eVA long enough to cause purchase delays (e.g. on vacation), you can temporarily delegate your approval authority to another user for a specified period of time.

### Step 1: Delegate

To delegate approval authority, go to the **My Home** tab on the **DASHBOARD** and select *Delegate authority* from the **Preferences** menu.

### Opening the Delegate Authority Screen

The screenshot shows the eVA dashboard. The 'My Home' tab is selected. A red arrow points to the 'My Home' tab. The 'Preferences' menu is open, and the 'Delegate authority' option is highlighted with a red circle. Below the menu, there is a table with columns 'To', 'Status', and 'Submitted'. The table contains two rows of data.

To	Status	Submitted
PR485369	4/8/2013	Pond, Emily
PR485379	4/3/2013	User1, mobile

Insert the required information on the Delegate Authority screen. If the name of the person to whom you want to delegate authority does not appear in the **Delegatee:** drop-down list, select **Search for more...**

### Completing Delegation of Authority

The image shows two screenshots of the eVA 'Delegate Authority' screen, connected by a large red arrow pointing downwards. The top screenshot shows the form with empty fields for Delegatee, Delegation Start Date, Delegation End Date, and Delegation Reason. The bottom screenshot shows the same form with the following values entered: Delegatee is 'QAdmin2\_a', Delegation Start Date is 'Fri, 12 Apr, 2013', Delegation End Date is 'Mon, 29 Apr, 2013', and Delegation Reason is 'Vacation'. The 'Notification' checkbox is checked in the bottom screenshot.

**Top Screenshot (Empty Form):**

- Header: eVA, My Home, My Orders/My UPs, My Approvals, My Quick Quote Req's, Home | Help \* | Logout, Welcome Pond, Emily
- Sub-header: Create, Search, Manage, Recent, Preferences
- Section: Delegate Authority, UP480676: User Profile Changes for Pond, Emily
- Buttons: Next, Exit
- Fields: Delegatee (empty), Delegation Start Date (empty), Delegation End Date (empty), Delegation Reason (empty), Notification (unchecked)

**Bottom Screenshot (Filled Form):**

- Header: eVA, My Home, My Orders/My UPs, My Approvals, My Quick Quote Req's, Home | Help \* | Logout, Welcome Pond, Emily
- Sub-header: Create, Search, Manage, Recent, Preferences
- Section: Delegate Authority, UP480676: User Profile Changes for Pond, Emily
- Buttons: Next, Exit
- Fields: Delegatee (QAdmin2\_a), Delegation Start Date (Fri, 12 Apr, 2013), Delegation End Date (Mon, 29 Apr, 2013), Delegation Reason (Vacation), Notification (checked)

Use the calendar icons to set the **Delegation Start Date** and the **Delegation End Date**. The Delegation Start Date is the first date your delegate can act as your approver; the Delegation End Date is the date your delegation of authority expires. The delegation begins and ends at midnight on the specified dates, except when the delegation start date is the current date. In that case, the delegation is effective immediately.

You may choose to enter a **Delegation Reason**. If you want to continue to receive approval notification emails while you are away, click the **Notification** checkbox; you and your delegate will both receive the notifications. When finished, click **Next**.

When you submit a Delegation of Approval, a User Profile (UP) document will appear in the My Documents list on your eVA dashboard.

## Step 2: Approval Flow

The default approval flow assigned to your user profile is displayed on this screen. Click **Next** when you are ready to proceed to the next step.

### Approval Flow Screen

The screenshot shows the eVA system interface. At the top, there's a navigation bar with 'My Home', 'My Orders/My UPs', 'My Approvals', and 'My Quick Quote Req's'. Below this is a sub-navigation bar with 'Create', 'Search', 'Manage', 'Recent', and 'Preferences'. The main content area is titled 'UP480676: User Profile Changes for Pond, Emily'. On the left, there's a 'Delegate Authority' sidebar with three steps: 1. Delegate, 2. Approval Flow (selected), and 3. Review Changes. The main area shows the 'APPROVAL FLOW - USER PROFILE' section. It includes a legend for 'Pending' and a flow diagram showing the request being approved by 'Smith, John' and 'Paca, Alison'. At the bottom, there are 'Add Approver' and 'Delete Approver' buttons. Navigation buttons at the top right and bottom right include 'Prev', 'Next' (highlighted with a red circle), and 'Exit'.

## Step 3: Review Changes

The **REVIEW CHANGES** screen provides an opportunity to take a second look before you submit your changes.

### Review Delegation of Authority Changes

The screenshot shows the eVA system interface for the 'Review Delegation of Authority Changes' screen. The navigation bar and sub-navigation bar are the same as in the previous screen. The main content area is titled 'UP480676: User Profile Changes for Pond, Emily'. On the left, the 'Delegate Authority' sidebar shows three steps: 1. Delegate, 2. Approval Flow, and 3. Review Changes (selected). The main area shows the 'Review your request and then submit it for approval.' section. It includes a table with columns 'Change', 'From', and 'To'. The table lists changes for 'Delegatee', 'Delegation Start Date', 'Delegation End Date', and 'Delegation Reason'. Below the table, there are checkboxes for 'Continue to notify me by email of approval requests'. Navigation buttons at the top right and bottom right include 'Prev', 'Submit' (highlighted with a red circle), and 'Exit'.

When satisfied that your changes are correct, click **Submit** to activate your delegation of authority.

### “Act as User” Screen

During the delegation period, your delegated approver will see the **ACT AS USER** screen when accessing the eMail/eForm link. This screen prompts the delegate to select which User ID to work under for that session. The delegate must choose whether to act under his own name for regular eMail functions, or to act as an approver on your behalf (or 'on behalf of' another delegator, if applicable).



## Act as User Screen Prompts ID Selection

**eVA**

### Act as User

You have the permission to act as the users listed below. You can log in as yourself or as the other user.

Log in as:

- [O'Admin2, a](#) - 1307 requests require action
- [Pond, Emily](#) - 39 requests require action

When a user is acting under a delegation of authority, access to eMail functions is limited. You will NOT be able to create transactions nor do receiving under that ID.

## Restricted Access Under Delegation of Authority

**eVA**

Home | Help | Logout  
Acting as: Pond, Emily **(Stop)**  
Welcome O'Admin2, a

Common Actions restricted under delegated User ID

Click (Stop) to revert to your own ID

ID	Date	From	Status	Title	Required Action
PR485436	4/9/2013	user1, mobile	Submitted	email test	<a href="#">Approve</a>
PR485379	4/3/2013	user1, mobile	Submitted	Mobile Test	<a href="#">Approve</a>
PR485365	3/28/2013	Pond, Emily	Submitted	Copy of Printer Supplies Req	<a href="#">Approve</a>
PR485349	3/27/2013	user, mobile	Submitted	ACP Consulting Test	<a href="#">Approve</a>

A delegate can exit from the delegated User ID and resume using their own User ID by simply clicking the (Stop) link in the upper right corner of the screen. eVA will restore full access under the delegate's personal User ID.

## Active Delegation of Authority

If you log on before your delegation of approval authority expires, you will be notified via the **ACTIVE DELEGATION OF AUTHORITY** screen. Choose whether to continue using the delegation of authority or Stop using the delegation of authority by clicking the appropriate link. Your choice is effective immediately.

**eVA**

### Active Delegation of Authority

You have logged in while a delegation on your behalf is still in effect. You can continue or cancel the delegation.

**Pond, Emily** has delegated your authority to **O'Admin2, a**, from 4/10/2013 12:00 AM to 4/11/2013 11:59 PM.

What would you like to do?

- [Continue](#) using the delegation of authority
- [Stop](#) using the delegation of authority